



Envision Arlington Fiscal Resources Task Group
Meeting Minutes
7:30 PM 2/15/24
Town Hall Annex First Floor

ATTENDEES: Gordon Jamieson (Co-Chair), Heather Remoff, Brian Hasbrouck, Pete Howard (Secretary)

1. Gordon discussed the Town Manager's critique of Jonathan's most recent update of the Town Government Primer with Joan Roman, Public Information Officer. She has agreed to do the updates so the Primer can be used for Citizen's Academy. Jonathan, who has not gotten to this task, does not object.
2. Leadership Interviews: There was a general discussion. The existing interviews are out of date. If maintained, they would be useful to the public as el as Citizen's Academy. We would like to have the Town maintain this material. Gordon did not discuss with Joan. Gordon will prepare an outline for discussion at the next meeting.
3. Budget Update: Gordon provided the most recent update to the Long Range Plan (Ref1) as presented to the Select Board by the Town Manager. He pointed out that the recent 3 year override (FY24, FY25, FY26) will still require an additional \$1m based on current projections. He pointed out how various changes could occur that would cover this shortfall without a premature override or serious cuts.
4. MBTA Community Assessments: Gordon provided a table (Ref 3) that he prepared from State sources. These sources are (now out of date) legislation regarding MBTA assessments due from cities and towns. The table shows the 2024 assessments (Cherry Sheet) of each of the MBTA Communities grouped according to the type of service provided by the MBTA according to the MBTA Communities Act. Arlington is listed with the "Adjacent communities". Arlington was assessed \$3.4m, far more than any other community in that grouping. Gordon computed the assessment for each community based on MBTA Communities Act Section 9 (Ref 2) of the state law. According to this work, Arlington's assessment should be \$0.774m. The group discussed this result and whether the Town should sue the MBTA or whether the MBTA has more important problems.
5. Next meeting 3/21/24 in Town Hall Annex 1st floor conference room.

Ref 1 Long Rang Plan based on the Governor's Budget Update

Ref 2 Section 9 of the General Laws

Ref 3 MBTA Assessments computed Based on General Law (Compressed EXCEL file)

Ref 1

Updated LRP - Governor's Budget Update

	FY 2024	FY 2025	Dollar Change	Percent Change	FY 2024	Dollar Change	Percent Change	FY 2027	Dollar Change	Percent Change	FY 2028	Dollar Change	Percent Change	FY 2029	Dollar Change	Percent Change
I. REVENUE																
A. State Aid	28,313,640	28,603,011			28,385,265			28,252,560	1,900,275	6.7%	28,458,277	28,829,290	1.3%	29,748,085	290,808	1.0%
B. Local Contribution Aid	0	0			0			0	0	0.0%	0	0	0.0%	0	0	0.0%
C. Local Receipts	9,855,994	10,255,994			10,355,994			10,455,994	10,055,994	0.0%	10,555,994	10,555,994	0.0%	10,555,994	0	0.0%
D. Free Cash	7,956,044	8,904,936			5,704,870			5,704,870	5,704,870	0.0%	5,704,870	5,704,870	0.0%	5,704,870	0	0.0%
E. Charities/Lease Income	450,000	450,000			200,000			200,000	200,000	0.0%	200,000	200,000	0.0%	200,000	0	0.0%
F. Property Tax	151,851,908	165,547,427			169,850,475			174,107,161	178,750,545	2.6%	183,155,446	183,155,446	0.0%	183,155,446	0	0.0%
G. Override: A Sabilion Fund	790,000	411,183			12,809,875											
TOTAL REVENUE	206,295,584	216,815,133			227,802,545			216,815,623	224,019,681	2.4%	225,465,595	225,465,595	0.0%	225,465,595	0	0.0%
II. APPROPRIATIONS																
A. One Time COS Compact	0	0			0			0	0	0.0%	0	0	0.0%	0	0	0.0%
B. School Activities	1,000,000	3,100,000			1,700,000			600,000	300,000	0.0%	300,000	0	0.0%	0	0	0.0%
C. General Education Costs	57,312,461	61,351,257			66,753,248			70,876,830	73,786,772	4.1%	76,140,590	76,140,590	0.0%	76,140,590	0	0.0%
D. Special Education Costs	30,670,757	32,025,136			34,107,004			34,123,939	34,845,016	2.1%	35,193,450	35,193,450	0.0%	35,193,450	0	0.0%
E. Growth Factor	964,135	44,635			26,781			124,240	(490,885)	(0.4%)	(197,346)	(197,346)	(0.1%)	(197,346)	(197,346)	(0.1%)
Net School Budget	89,347,334	95,524,085			102,887,033			107,586,541	112,249,893	4.3%	117,946,132	117,946,132	0.0%	117,946,132	0	0.0%
Maintenance, Operating and Capital	1,112,915	673,684			6,990,953			2,234,735	2,647,910	2.1%	2,750,708	2,750,708	0.0%	2,750,708	0	0.0%
Maintenance (Exempt Capital)	1,820,001	1,830,191			1,830,191			1,830,191	1,830,191	0.0%	1,830,191	1,830,191	0.0%	1,830,191	0	0.0%
Capital	0	0			0			0	0	0.0%	0	0	0.0%	0	0	0.0%
Town Expenses	12,322,308	12,699,946			13,012,084			13,158,867	13,979,870	6.2%	14,197,345	14,197,345	1.6%	14,197,345	0	0.0%
E. Expense for and Other	8,217,455	9,218,666			9,332,293			9,431,100	9,542,817	1.2%	9,657,995	9,657,995	0.0%	9,657,995	0	0.0%
Net Town Expenses	43,989,064	42,982,693			46,847,864			45,789,290	47,777,444	4.3%	48,631,958	48,631,958	0.0%	48,631,958	0	0.0%
MWRA Debt Int	0	0			0			0	0	0.0%	0	0	0.0%	0	0	0.0%
B. Capital budget																
E. Exempt Debt Service	12,028,956	12,522,767			12,393,129			12,157,188	12,066,529	(0.8%)	12,066,529	12,066,529	0.0%	12,066,529	0	

Ref 2

MBTA Community Act Section 9. Financial assistance from cities and towns

Notwithstanding the provisions of any general or special law to the contrary, all cities and towns of the authority shall contribute to the Massachusetts Bay Transportation Authority State and Local Assistance Fund an amount in the aggregate not less than \$136,026,868 which, after fiscal year 2006, shall be adjusted each July 1 by the growth rate of the inflation index over the preceding 12 months; provided, that, after said fiscal year, in no case shall said assessment exceed 102.5 per cent of the previous year's assessment. Each municipality's share of said assessment shall equal its weighted percentage of the total population of the authority. For the purposes of this calculation, said weights shall be as follows: Boston, 18; Brookline and Cambridge, 12; the 14 cities and towns excluding Boston, Brookline and Cambridge, 9; the 51 cities and towns, 3; other served communities, 1. Population shall mean population as most recently estimated and published by the United States Census Bureau. On or before March 1 of each year, the authority shall certify to the state treasurer the amount to be assessed to each city and town as aforesaid on account of the ensuing fiscal year, and the state treasurer shall, on behalf of commonwealth, assess each such city and town on account of such year in accordance with the provisions of section 20 of chapter 59. Beginning on July 1, 2001, a city or town that is also a member of a regional transit authority or that at any time joins a regional transit authority shall have 100 per cent of the amount assessed for the operation of the regional transit authority credited against its share of the assessment made under this section; provided, however, that the amount credited shall not exceed the total amount of the assessment; and provided further, that the amount credited shall be the most recently audited regional transit authority assessment available on January 1 of each year and shall be used to calculate the upcoming fiscal year's estimated cherry sheet assessments. The total amount of regional transit authority credits authorized herein shall be re-assessed to the 14 cities and towns and the 51 cities and towns based on the weighted percentage of said cities and towns' share of the population of said 14 and 51 cities and towns. For the purposes of this section, the words "inflation index" shall mean the per cent change in inflation as measured by the per cent change in the consumer price index for all urban consumers for the Boston metropolitan area as determined by the bureau of labor statistics of the United States department of labor.

A city or town assessed by the authority that is not receiving paratransit services for the disabled from the authority shall have 50 per cent of the amount it expended in the previous fiscal year for the operation of or membership in a local or regional paratransit service credited against its share of the assessment made under this section. The amount credited shall not exceed the total amount of the assessment. The credit shall apply only to services provided to individuals eligible for paratransit services. As used in this paragraph, "paratransit services" shall mean services provided to individuals with disabilities who, as the result of a physical or mental impairment, including a vision impairment, are unable to board, ride or disembark from a vehicle in the authority's regular transportation system without the assistance of another individual, except the operator of a wheelchair lift or other boarding assistance device.

Ref 3

Municipal ity	MBTA Category	MBTA Assess ment	Bost on Metr o Tran sit Dis	Region al Transit	2022 Populat ion			
Boston	*Rapid Transit*	97,299,014	11,883	0	650,706	97,299,014		
		97,299,014			650,706	97,299,014	97,299,014	0.43
Braintree	Rapid Transit	961,143	0	0	38,567	2,763,371		
Brookline	Rapid Transit	6,233,838	1,569	0	62,535	4,479,137		
Cambridge	Rapid Transit	11,811,545	3,692	0	118,488	8,486,112		
Chelsea	Rapid Transit	2,888,664	269	0	38,637	2,768,117		
Everett	Rapid Transit	3,689,613	499	0	49,350	3,535,486		
Malden	Rapid Transit	4,838,140	524	0	64,712	4,636,167		
Medford	Rapid Transit	4,889,503	729	0	65,399	4,685,186		
Milton	Rapid Transit	2,120,611	399	0	28,364	2,031,915		
Newton	Rapid Transit	6,532,969	1,905	0	87,381	6,259,046		
Quincy	Rapid Transit	2,535,179	0	0	101,727	7,288,859		
Revere	Rapid Transit	4,375,798	493	0	58,528	4,193,107		
Somerville	Rapid Transit	5,963,341	1,198	0	79,762	5,713,843		
Abington	Commuter Rail	56,840,344	11,277	0	793,450	56,840,344	56,851,621	0.25
Acton	Commuter Rail	94,926	0	31,565	16,965	290,322		
Andover	Commuter Rail	0	0	237,141	23,829	214,981		
Ashland	Commuter Rail	323	0	270,646	36,363	419,291		
Attleboro	Commuter Rail	0	0	158,703	18,466	191,664		
	Commuter	0	0	485,178	46,601	399,011		

	Rail					
Ayer	Commuter Rail	24,103	0	37,791	8,424	122,043
Belmont	Commuter Rail	1,996,951	545	0	26,710	506,240
Beverly	Commuter Rail	1,052,555	0	0	42,235	801,350
Billerica	Commuter Rail	0	0	348,479	41,319	435,491
Bridgewater	Commuter Rail	154,354	0	60,224	28,780	485,836
Brockton	Commuter Rail	0	0	2,827,924	104,826	- 838,997
Canton	Commuter Rail	613,291	0	0	24,609	466,921
Cohasset	Commuter Rail	207,994	0	0	8,346	158,354
Concord	Commuter Rail	447,439	0	0	17,954	340,652
Dedham	Commuter Rail	622,960	0	0	24,997	474,283
Fall River	Commuter Rail	0	0	1,656,759	93,682	120,726
Fitchburg	Commuter Rail	0	0	1,052,510	41,502	- 265,067
Framingham	Commuter Rail	254,554	0	1,512,801	70,963	- 166,377
Franklin	Commuter Rail	0	0	283,263	33,656	355,313
Freetown	Commuter Rail	3,573	0	39,718	9,236	135,522
Gloucester	Commuter Rail	0	0	418,100	29,836	147,997
Halifax	Commuter Rail	57,407	0	0	7,698	146,059
Hamilton	Commuter Rail	32,283	0	155,158	7,526	-12,363
Hanson	Commuter Rail	77,074	0	1,876	10,587	198,998
Haverhill	Commuter Rail	0	0	893,125	67,153	381,010
Hingham	Commuter Rail	601,353	0	0	24,130	457,833
Holbrook	Commuter Rail	281,238	0	0	11,285	214,117
Ipswich	Commuter Rail	0	0	106,819	13,848	155,928
Kingston	Commuter Rail	70	0	108,194	13,829	154,192
Lawrence	Commuter Rail	0	0	1,279,064	87,954	389,741
Leominster	Commuter Rail	0	0	800,265	43,646	27,857
Lincoln	Commuter	170,836	0	0	6,855	130,064

	Rail					
Littleton	Commuter Rail	58,626	0	26,187	10,139	166,186
Lowell	Commuter Rail	0	0	1,152,755	113,608	1,002,799
Lynn	Commuter Rail	2,514,345	0	0	100,891	1,914,266
Manchester By The Sea	Commuter Rail	133,429	0	0	5,354	101,585
Mansfield	Commuter Rail	0	0	198,851	23,816	253,024
Melrose	Commuter Rail	726,583	0	0	29,155	553,176
Middleborough	Commuter Rail	0	0	197,282	24,376	265,219
Natick	Commuter Rail	273,059	0	630,414	36,272	57,797
Needham	Commuter Rail	800,326	0	0	32,114	609,318
New Bedford	Commuter Rail	0	0	1,404,966	100,682	505,335
Newburyport	Commuter Rail	0	0	178,058	18,662	176,027
Norfolk	Commuter Rail	157,536	0	136,852	11,552	82,331
Norwood	Commuter Rail	780,463	0	0	31,317	594,196
Randolph	Commuter Rail	860,536	0	0	34,530	655,159
Reading	Commuter Rail	628,144	0	0	25,205	478,230
Rockport	Commuter Rail	0	0	108,172	6,925	23,220
Rowley	Commuter Rail	2,629	0	44,192	6,283	75,019
Salem	Commuter Rail	1,114,535	0	0	44,722	848,538
Scituate	Commuter Rail	4,304	0	145,720	19,190	218,384
Sharon	Commuter Rail	458,753	0	0	18,408	349,266
Shirley	Commuter Rail	26,798	0	25,186	6,782	103,493
Southborough	Commuter Rail	0	0	94,898	10,409	102,598
Stoughton	Commuter Rail	0	0	235,604	28,969	314,042
Swampscott	Commuter Rail	380,799	0	0	15,280	289,917
Taunton	Commuter Rail	0	0	495,056	59,922	641,880
Wakefield	Commuter	674,597	0	0	27,069	513,597

	Rail							
Walpole	Commuter Rail	654,860	0	0	26,277	498,569		
Waltham	Commuter Rail	1,596,589	0	0	64,065	1,215,544		
Wellesley	Commuter Rail	323,535	0	436,836	30,524	142,314		
Wenham	Commuter Rail	122,763	0	0	4,926	93,464		
Westborough	Commuter Rail	149,732	0	10,638	21,506	397,408		
Weston	Commuter Rail	290,608	0	0	11,661	221,251		
Westwood	Commuter Rail	404,499	0	0	16,231	307,961		
Weymouth	Commuter Rail	1,430,737	0	0	57,410	1,089,275		
Whitman	Commuter Rail	84,768	0	29,002	15,259	260,516		
Wilmington	Commuter Rail	570,800	0	0	22,904	434,571		
Winchester	Commuter Rail	564,220	0	0	22,640	429,562		
Woburn	Commuter Rail	1,027,958	0	0	41,248	782,623		
Worcester	Commuter Rail	0	0	4,192,482	205,319	-		
		23,509,815	545	22,508,454	2,425,412	23,509,815	46,018,814	0.21
Amesbury	Adjacent community	0	0	213,353	17,179	79,164		
Arlington	Adjacent community	3,403,415	710	0	45,522	774,419		
Auburn	Adjacent community	0	0	284,160	16,762	1,256		
Bedford	Adjacent community	352,912	0	0	14,161	241,127		
Bellingham	Adjacent community	0	0	175,511	17,407	120,888		
Burlington	Adjacent community	647,109	0	0	25,966	442,138		
Chelmsford	Adjacent community	0	0	286,723	35,906	324,669		
Danvers	Adjacent community	692,341	0	0	27,781	473,043		
Dracut	Adjacent community	0	0	239,482	32,060	306,422		
Duxbury	Adjacent community	0	0	138,229	16,107	136,034		

East Bridgewater	Adjacent community	56,971	0	49,915	14,338	194,226
Easton	Adjacent community	175,907	0	12,308	25,240	417,468
Foxborough	Adjacent community	0	0	148,612	18,488	166,194
Georgetown	Adjacent community	1,902	0	60,754	8,408	82,414
Grafton	Adjacent community	76,839	0	70,876	19,815	266,525
Hanover	Adjacent community	9,680	0	105,378	14,758	145,915
Holden	Adjacent community	134,981	0	13,262	19,880	325,246
Holliston	Adjacent community	0	0	154,120	14,856	98,841
Hopkinton	Adjacent community	86,476	0	57,028	19,249	270,736
Hull	Adjacent community	252,753	0	0	10,142	172,694
Lexington	Adjacent community	849,172	0	0	34,074	580,197
Lynnfield	Adjacent community	322,757	0	0	12,951	220,524
Marblehead	Adjacent community	504,235	0	0	20,233	344,519
Marlborough	Adjacent community	0	0	372,805	5,291	- 282,712
Marshfield	Adjacent community	0	0	225,453	25,713	212,377
Maynard	Adjacent community	0	0	91,812	10,546	87,761
Medfield	Adjacent community	325,772	0	0	13,072	222,584
Medway	Adjacent community	0	0	105,915	13,393	122,135
Methuen	Adjacent community	0	0	929,998	53,241	-23,433
Middleton	Adjacent community	245,152	0	0	9,837	167,500
Millbury	Adjacent community	0	0	106,044	13,936	131,252
Millis	Adjacent community	51,932	0	0	8,836	150,456
North Andover	Adjacent community	8,107	0	225,102	31,295	307,776
North Attleborough	Adjacent community	0	0	248,862	30,930	277,801
North Reading	Adjacent community	14,727	0	101,152	15,549	163,610

Northborough	Adjacent community	89,206	0	27,578	15,663	239,125		
Northbridge	Adjacent community	24,701	0	97,057	16,337	181,122		
Norton	Adjacent community	26,068	0	122,230	19,108	203,133		
Norwell	Adjacent community	16,729	0	0	11,280	192,071		
Peabody	Adjacent community	1,343,164	0	0	53,896	917,718		
Pembroke	Adjacent community	0	0	169,004	18,297	142,549		
Plymouth	Adjacent community	24,289	0	477,664	64,269	616,681		
Raynham	Adjacent community	4,292	0	116,640	15,474	146,845		
Rockland	Adjacent community	60,827	0	70,437	17,609	229,401		
Salisbury	Adjacent community	0	0	80,234	9,189	76,232		
Saugus	Adjacent community	711,431	0	0	28,547	486,086		
Seekonk	Adjacent community	46	0	122,468	15,649	143,996		
Shrewsbury	Adjacent community	175,972	0	120,778	39,805	557,004		
Stoneham	Adjacent community	565,840	0	0	22,705	386,611		
Sudbury	Adjacent community	10,725	0	130,606	18,965	192,322		
Tewksbury	Adjacent community	0	0	306,998	30,833	218,013		
Tyngsborough	Adjacent community	0	0	94,573	12,368	116,024		
Wareham	Adjacent community	0	0	243,079	23,151	151,126		
Watertown	Adjacent community	2,618,391	584	0	35,022	595,755		
Wayland	Adjacent community	33,760	0	68,086	13,664	164,579		
West Boylston	Adjacent community	0	0	81,405	7,757	50,678		
Westford	Adjacent community	0	0	189,618	24,353	225,054		
Winthrop	Adjacent community	461,295	0	0	18,510	315,180		
Wrentham	Adjacent community	0	0	101,302	12,457	110,810		
		14,379,876	1,294	7,036,611	1,257,830	14,379,876	21,417,781	0.10
Ashburnham	Adjacent	34,591	0	12,778	6,372	44,488		

m	small town					
Ashby	Adjacent small town	15,417	0	10,304	3,163	18,122
Berkley	Adjacent small town	10,464	0	42,229	6,797	18,856
Bourne	Adjacent small town	3,188	0	150,820	20,667	34,917
Boxborough	Adjacent small town	29,776	0	9,556	5,412	39,082
Boxford	Adjacent small town	1,612	0	58,838	8,112	14,065
Carlisle	Adjacent small town	0	0	52,119	5,157	-5,772
Carver	Adjacent small town	22,288	0	67,621	11,626	36,863
Dover	Adjacent small town	139,835	0	6,200	5,860	46,464
Essex	Adjacent small town	792	0	26,542	3,668	6,423
Groton	Adjacent small town	0	0	92,825	11,162	7,489
Groveland	Adjacent small town	443	0	49,641	6,721	10,761
Harvard	Adjacent small town	32,579	0	27,330	6,870	34,411
Lakeville	Adjacent small town	26,854	0	64,934	11,895	41,968
Lancaster	Adjacent small town	30,853	0	33,130	8,394	42,308
Leicester	Adjacent small town	0	0	137,621	11,033	-38,466
Lunenburg	Adjacent small town	17,172	0	75,171	11,835	31,191
Merrimac	Adjacent small town	0	0	78,247	6,699	-18,042
Nahant	Adjacent small town	81,966	0	0	3,289	29,559
Newbury	Adjacent small town	1,718	0	48,173	6,695	11,996
Paxton	Adjacent small town	37,329	0	137	5,024	45,014
Plympton	Adjacent small town	21,798	0	0	2,923	26,269
Princeton	Adjacent small town	23,035	0	3,093	3,504	28,398
Rehoboth	Adjacent small town	75,451	0	22,746	13,023	94,293
Rochester	Adjacent small town	4,588	0	0	5,816	52,269
Sherborn	Adjacent small town	28,937	0	3,664	4,372	35,628
Sterling	Adjacent small town	19,076	0	59,943	8,139	13,203
Stow	Adjacent	3,478	0	57,181	7,042	6,106

	small town								
Sutton	Adjacent small town	60,604	0	9,326	9,379	74,964			
Topsfield	Adjacent small town	162,089	0	0	6,504	58,452			
Townsend	Adjacent small town	357	0	66,322	8,948	14,095			
Upton	Adjacent small town	60,614	0	0	8,128	73,047			
West Bridgewater	Adjacent small town	45,776	0	11,078	7,625	57,449			
West Newbury	Adjacent small town	1,720	0	32,277	4,562	8,722			
Westminster	Adjacent small town	45,184	0	29,871	8,330	44,992			
		1,039,584	0	1,339,717	264,746	1,039,584	2,379,301	0.01	
					4,741,438		223,966,531		